Be Our Guest!

A SERIES OF WORKSHOPS ON CUSTOMER SERVICE

WORKSHOP ONE

Create a Culture of Service

PRACTICING WHAT WE ALREADY KNOW ABOUT CREATING A CULTURE OF SERVICE



LEADER'S GUIDE

Layout of the Leader's Guide



The author's welcome to this unique training.

TIPS ON LEADING A SESSION

We have included general information and guidelines for successfully leading your session; such as, being student centered, results based and creating a trusting environment. Specific guidance for each Workbook page is provided in the Leader's Session Notes.

SETUP FOR THE TRAINING SESSION

A listing of all the Resources, Materials & Media Aids required for the training session.

LEADER'S GUIDE

These course materials can be used three ways:

- 1) As a guide for site faciliatators during a live teleconference
- 2) With a video of the live presentation
- 3) By itself, with no video

RESOURCES SECTION

Contains or describes all of the materials that are required; including originals for copying as handouts and originals of Workbook pages to be used as Leader's aids for emphasis during the session. The Leader's Session Guide will list the resources to be used with each Workbook page.

Welcome

Welcome to **Be Our Guest**, a series of workshops on customer service. This first workshop is **Create a Culture of Service** - practicing what we already know about serving others. Welcome to what will be a very rewarding personal experience for you. As Session Leader, you have an unusual opportunity to help affect the performance of your coworkers and the success of your clinic. Following are items of importance about this training:

This training is important and timely! Never before has great customer service been more important to the success of an organization. The main reason that clients stay with a particular provider is the service they get, and a clinic must retain clients in order to stay open. So in a very real way, the customer service you provide impacts your day-to-day quality of life, not only helping you derive personal satisfaction delivering great service, but also assuring your employment and that of your clinic staff. In addition, in these days when attracting new employees and retaining experienced ones is so critical, the culture of the workplace and the employee's working environment have become fundamental considerations if an organization is to maintain its human resources.

You will find the learning techniques used in this program to be very powerful.

When used properly, these materials can instill in employees a more service-oriented attitude. Even though this program is simple and very easy to present to participants, it is strongly based on the physiological and psychological workings of how people learn and how they change behaviors. The result is that information presented is not only heard by participants, but also retained, maintained and used on a day-to-day basis until it becomes a new behavior.

This training is a basic cornerstone to build on. This training focuses on basic skills, attitudes and behaviors of people who are successful in having good relationships with others. Follow-up coaching and mentoring by an employee's managers/ supervisors is easier since they will have the common language and images produced by this training experience. Additional training such as **Be a Positive**

Impact Person and **Communicate with Trust**, Workshops Two and Three in this series, easily build upon the basic concepts of this training.

As the session leader, you are very important to the success of this training. Even though these materials are very powerful, you are a very important facilitator of the learning process. Your student-centered attitude and the trust participants have in you are key factors in the learning process. You will help participants to discover their own personal reasons to be service oriented. You will help them to learn and apply the skills of providing service to others. You will help them to share their ideas with other participants so everyone can learn from each other. You will be the one to impress upon them the importance of practicing these skills until they become as natural as saying "Hello!" They must be the ones who choose to do it, but you will facilitate them in doing it.

Thank you for your interest in helping others to be successful, for wanting to help others to grow as individuals and to enjoy their lives beyond their own imaginations. We believe you're going to have a great time showing employees how to create a culture of service and that this will be personally rewarding for you.

Enjoy yourself and your role in this human development process!

Ron Frank Creator of Sustained Learning Programs

Tips on Leading a Session

Keep the session "student centered."

Remember that the purpose of your teaching is not about you and your having a perfect delivery. Instead your purpose as a facilitator is the learning and growth of each of your students. You are present to help facilitate their growth by building rapport and a positive relationship with each person, creating safe conditions for dialogue and discussion, and keeping your focus on each of the participants by looking into their eyes and reading their nonverbal cues as you teach.

The session must be results oriented.

Throughout the session, have in mind the results that are desired for the session and keep focused on achieving them. Establish a "right reason" for the participants to learn and change behaviors. Build trust by showing the participants that you are interested in their success. State your expectation of their participation and the results you anticipate from their training.

Make the session experiential for all the participants.

Get everyone involved, even if you have to ask a question of a specific participant. We all learn better and keep our focus when we are involved in the discussion.

Facilitate the session "from the heart."

There is an old saying that "you must show them that you care before you can get them to listen to what you have to say." You will gain the trust of your participants if they know you are determined to help them develop skills that they can use to enjoy their work and their lives.

Summary of the Session Plan.

Give them a reason, show them that you care, get an Up-front Agreement of their participation, use visuals to create images, get participant's to share their own experiences, involve reluctant participants by asking them questions, guide the discussion to emphasize the key points that are being made and use positive strokes incessantly.

Above all else, have fun!

Enjoy your role and let it show through to each of the participants.

Setup for the Training Session

Resources and Materials:

The following Resources and Materials are critical to the learning process that is used in this training. Please use the following as a checklist to make sure that you have all of the materials and aids that you will need during the training session.

Please note: Specific items referred to on this list, such as originals for copying, are included in the Resources Section at the end of the Leader's Session Guide. The Leader's Session Guide will say when to use these items.

Specific Materials to have placed on the table for each Participant:

- Pencils or pens to take notes. (Take them yourself, don't rely on the participants to have them. Writing down notes is an important part of the learning process and we often guide participants to write down notes in their workbooks to help them learn)
- Workbooks for each participant (Each person must have their own workbook. This is critical for a successful learning session)

Specific Materials to have ready to distribute to the Participants during the session:

- Registration forms
- Pre-workshop survey
- Participant evaluation sheets

Materials for the Leader to have ready to use during the presentation:

- Several "Black" Magic Markers.
- Examples of the following to show during the presentation: Workplace Posters, Daily Cards, Daily Card Log, 30 Day Supervisor Review (to hold up and show the participants during the session. (Items follow in the Resources Section)

Flipchart or Scribe:

There are several activities that will require the use of a flipchart or whiteboard, if you have a large group, or perhaps a tablet in the middle of the table or a scribe to record group answers.



Workbook Cover Page

Leader's Guide

Note: All references to the "Presenter" are referring to the Live Teleconference Presenter.

Setup Prior to the Start of the Teleconference

Select a Scribe:

In advance of the start of the Teleconference, get someone to agree to be the Scribe for the session. Tell them that the Scribe duties are minimal, mostly just recording information from the flip charts/white board and faxing recorded information to the Teleconference Presenter, when asked. Scribe duties will be noted in this Leader's Guide as they occur.

Check to be certain that you have all session materials on hand:

- 1) Pre-workshop survey
- 2) Evaluation forms

Materials used at startup of the Session:

Registration forms, workbooks and pens, flip chart/white board for a large group or a large Tablet in the center of the table for a small group, or paper for a scribe to use for recording & faxing. If the attendees don't know each other well, or you don't know everyone attending, you could have name tents or badges for everyone, including yourself, and magic markers.

With the participants prior to the start of the teleconference:

- 1) Greet participants as they arrive.
- 2) Either use their name or complete a name tag.
- 3) Have participants complete registration forms and return to facilitator.
- 4) Make sure TV is tuned to correct channel. If not, find someone to do this.
- 5) Discuss agenda

Agenda

- 1) Review what you already know about serving others & providing great customer service.
- 2) Review why clients are important to your clinic's success and to the participant's success.
- 3) Form mental pictures of both good & bad client service.
- 4) Break 10 minutes
- 5) Learn the five key skills of providing good client service.
- 6) Relate these skills to performing your job.
- 7) Practice these skills for 30 days using workbook exercises.
- 8) Develop the habit of providing great customer service.



Exercise: Survey

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Letter to Participants

Teleconference Begins

Pre-Workshop Survey

To discover class participants' needs, hand out the Pre-Workshop Survey when the presenter says to. Ask participants to complete it. Tell them that the Survey is designed to help them to monitor their own progress and that their answers will be confidential. They will not be asked to put their name on their answer sheet but we do need them to put the last four digits of their driver's license. Tell them they will get the most benefit out of this teleconference personally if they are very frank and objective with their answers. Pass around an envelope for them to place the survey in after it is completed.

Scribe: Total & Fax.

The scribe will *total* the responses on a blank Pre-Workshop Survey by marking the total number of participant responses for each box on the survey. The scribe can total the responses and write the total in the box or just put a check mark beside the box for each time a respondent checked that box. The scribe will then *fax* the consolidated survey sheet to the teleconference center. Again, there will be no names, just numbers on the survey sheets that are consolidated so that confidentiality is maintained.

Then the scribe will mail the envelope with all the forms in it to the state office at:

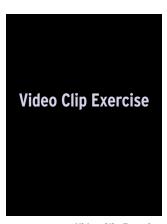
Texas Department of Health WIC Programs 1100 W. 49th Austin, TX 78756 Attn: Missy Hammer

Read the Participant's Letter

Ask the participants to read The Participant's Letter on Page 1 of the workbook when the presenter says to. Tell them that it states the purpose of the program, how this specially designed training works more effectively, what kinds of activities to expect in the follow up and, most importantly, the benefit to each of them personally.



Workbook Page 2
Presentation Slide 1



Video Clip Exercise:

Slide 1: Why?

The presenter will give the teleconference objectives.

- 1) List 5 keys to create a culture of service
- 2) List 2 ways to do each of them
- 3) List 2 ways to remember them

Slide 2: Be Our Guest!

Presenter will talk about the series.

Slide 3: The First Workshop - A Culture of Service

Slide 4: Video Clip Exercise

Prior to the video clip airing, the presenter will ask the participants to make two lists of notes in their workbooks under Slide 4 as they watch. 1) One list will be of the *behaviors or characteristics* of the two persons in the video clip (such as loud, aggressive, short, rude, disrespectful, piercing eyes, attempting to talk but unable to get a word in, passive, initially smiling, later frowning). 2) The second list will be of the *feelings* that they think each of the two persons is having (such as, anger, surprise, shock, hurt, scared, unappreciated, disrespected, controlling, controlled, not helped, intruded upon, stomped on).

After the video clip, the presenter will discuss the video briefly, then ask you to lead a discussion about how the audience members felt the last time they were treated rudely, unfairly or neglected by someone who was "serving" them. Record the feelings that the participants had when they were treated poorly. After you have recorded a few of their offerings, ask them to refresh their memory as to where, what time, what was happening in their lives when this "server" treated them poorly. Then have them add more "feelings" to your flipchart list.

Slide 5: Doing what's right

Slide 6: Why is my client's success important to me?

Slide 7: What role do our clients and co-workers play?

Slide 8: Who are the people we serve?

Slide 9: The key to success is keeping clients

Slide 10: Customers go where they want to go...

Key No. 1 Make your clients feel welcome

Exercises on the Five Keys

Key No. 2 Obtain and use your client's names

Exercises on the Five Keys

Key No. 3 Discover your client's needs

Exercises on the Five Keys

Slide 11: The Five Keys

There will be a video clip for each key and the presenter will discuss each of the five keys, one at a time. The presenter will allow you to have time for a group discussion about each key. The process to follow with each key will be the same, so repeat the process described here for each of the five keys. (This process could vary slightly depending on Survey responses.)

Slide 12: Exercise Key 1 Slide 13: Exercise Key 2 Slide 14: Exercise Key 3 Slide 15: Exercise Key 4 Slide 16: Exercise Key 5

Ask the group how they perform the key in their job. List these, or have the Scribe list these on the flipchart/whiteboard as the group brainstorms. Try to get everyone in the group to offer an idea. Ask them, by name, what they do. Ask if anyone got any ideas from the video clip about how to handle this key. Ask if anyone has gotten any ideas how the clinic might handle this key. Keep listing all the ideas.

Last 30 seconds. Near the end of the allowed group time for each key, tell the group that, as a group, they are to choose a few of the best ideas that came out of their discussion. Ask the group if they believe it would be worthwhile to distribute a list of all the good ideas to all the people that work in the clinic so they would be a handy reminder for everyone. Get the group to agree that this would be a good idea and ask the Scribe to make a list of the ideas on the flipchart highlighting the ones that the group thought were the best.

Key No. 4 Tell your clients you appreciate them

Exercises on the Five Keys

Key No. 5 Invite your clients back

Exercises on the Five Keys

SCRIBE. Record the flipchart/whiteboard List for each key & fax.

For each of the five keys the scribe will make a list of the best ideas on a sheet of paper. After all of the best ideas have been captured for all five keys the scribe will fax the list to the teleconference center.

Slide 17: Review the 5 Keys

Slide 18: Practicing - Using Daily Reminders

After the teleconference has concluded, discuss the Daily Reminders: which ones you are going to use, and how you are going to use them.

Slide 19: Posters as reminders Slide 20: Daily reminder cards

The presenter will discuss the importance of having daily reminders of this training session. He will discuss several ways to do this including Daily Reminder Cards. In your group, decide if you wish to make it fun to do the Daily Reminder Cards by having a drawing of the cards turned into a fish bowl each day for some sort of prize. Someone should be designated as responsible for collecting the cards from the fish bowl daily so that a drawing can be held at the end of the week, or at the end of the 30 days, whatever the group decides. Cards that are not submitted daily would not be included in the drawing, as an incentive to turn them in daily.

The presenter will review the 5 keys and conclude the presentation.

Facilitators should have participants complete evaluation forms and collect and mail to state office along with pre-workshop surveys.

Thank participants for coming and invite them back to the next teleconference entitled "Be a Positive Impact Person."



Workbook Daily Reminder Cards

Pre-workshop Survey:

Questions 1 through 5, check the box that best describes your meeting with a client at your clinic.

1.	Do you	welcome your clients when you first see them?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
2.	While y	ou are serving your clients, how often do you usually call them by name?
		Never
		Once
		A few times
		Several times
3.	Do you	take care of your clients needs?
		Sometimes
		Most of the time
		Almost all of the time
		Always
4.	Did you	thank your clients for coming to see you?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
5.	Do you	invite, or encourage, your clients to come back at their next scheduled
	appoint	ment time?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
Εo	r tha fall	lowing question, check all of the boxes that you believe describe how your client feels
		eting with you at your clinic.
6.	When y	our clients leave you after visiting yosur clinic, how do you think they feel?
		That you were glad to see them.
		That they were an intrusion on your day.
		That you were just doing your job; no more, no less.
		That you enjoyed satisfying their needs.
		They felt appreciated and treated like a quest

Post-workshop Survey:

Questions 1 through 5, check the box that best describes your meeting with a client at your clinic.

1.	Do you	welcome your clients when you first see them?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
2.	While y	ou are serving your clients, how often do you usually call them by name?
		Never
		Once
		A few times
		Several times
3.	Do you	take care of your clients needs?
		Sometimes
		Most of the time
		Almost all of the time
		Always
4.	Did you	ı thank your clients for coming to see you?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
5.	Do you	invite, or encourage, your clients to come back at their next scheduled
	appoint	tment time?
		Never
		Hardly ever
		Sometimes
		Most of the time
		Almost all of the time
		Always
Fο	r the fol	lowing question, check all of the boxes that you believe describe how your client feels
		eting with you at your clinic.
6.	When y	our clients leave you after visiting your clinic, how do you think they feel?
		That you were glad to see them.
		That they were an intrusion on your day.
		That you were just doing your job; no more, no less.
		That you enjoyed satisfying their needs.
		They felt appreciated and treated like a quest

Practicing What I Already Know About Creating a Culture of Service

30-Day Review:

Employee	Comments: (Please mark your re	esponses below).
1. The two	most difficult things for me to	do during the last 30 days:
	Welcoming clients	
	Using client names	
	Discovering client needs	
	Thanking clients	
	Inviting clients back	
2. The two	things that I found most enjoy	able during the last 30 days:
	Welcoming clients	
	Using client names	
	Discovering client needs	
	Thanking clients	
	Inviting clients back	
Supervisor	r Observations: (Please mark you	ur responses below).
1. The two	most difficult things for the em	ployee to do were:
	Welcoming clients	
	Using client names	
	Discovering client needs	
	Thanking clients	
	Inviting clients back	
2. The two	most enjoyable things for the	employee to do were:
	Welcoming clients	
	Using client names	
	Discovering client needs	
	Thanking clients	
	Inviting clients back	
Employee Signa	ature:	Date:
Supervisor Sign	ature:	Date:

Turning in Our Daily Reminder Cards to "Create a Culture of Service"

	Week 1					Week 2					Week 3					Week 4				
Name of Employees	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Tommy R.	a	a	а	a	a	a	a	a	a	a	a	a	а	a	a	a	a	a	a	а
Danny C.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	а
Ron F.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	а	a
Bill M.	а	a	а	a	a	а	a	а	a	a	а	a	а	а	a	а	a	a	а	а
Mary Ann S.	a		а	a		a		а	a				а	а	a					a
Carol T.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	а	a
Paula K.	a	a		a	a	a		а	a	a		a	а	а	a	a				
Jimmy P.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	а	а
Sandra R.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	а
Jack W.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	a
Rose F.	а	a	а	a	a	a	a	а	a	a	а	a	а	а	a	a	a	a	а	а
Bill W.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	а
Jeff L.	а		а	a	a				a	a	а		а	а		a	a		a	
Cathy Ann T.	а	a	а	a	a	a	a	а	a	a	а	a	а	а	a	a	a	a	а	a
Kay T.	а	a	а	a	a	a	a	а	a	a	а	a	а	а	a	a	a	a	а	а
Jenny M.	а	a	а	a	a	a	a	а	a	a	а	a	а	а	a	a	a	a	а	a
Will B.	a	a	а	a	a		a	а	a	a	а	a	а	а	a	a	a	a	a	а
Charlotte Y.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	а
Phillip B.	a	a	а	a	a	a	a	a	a	a	а		а	а	a	a	a	a	a	а
Jarod R.	a	a	а	a	a	a	a	a	a	a	а	a	а	а	a	a	a	a	a	а
Titus M.	а	a	а	a	a	a	a	а	a	a	а	a	а	а	a	a	a	a	а	a
Stephanie S.	а	a	а	a	a	а	a	а	а	а	а	a	а	а	a	а	a	a	а	а
Pat W.	а	a	а	a	a	а	a	а	а	а	а	a	а	а	a	а	a	a	а	а
Susan V.	а	a	а	a	a	а	a	а	а	а	а	a	а	а	a	а	a	a	а	а
Jerry W.	а	a	а	a	a	а	a	а	a	a	а	a	а	а	a	а	a	a	a	а